



California
DEPARTMENT OF TECHNOLOGY

Service Request Management (SRM) External Addendum Submitter User Guide

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1.0 Overview

The ITSM Service Request Management (SRM) application (commonly known as Remedy) is a web portal for creating, approving and tracking service requests submitted to the California Department of Technology (CDT). This document is an addendum to the SRM User Guide for Submitters and provides some additional examples of how CDT customer may submit Service Requests.

2.0 Additional Service Request Examples

Within Section 2.0 of the SRM Submitters User Guide, the example presented to submit a service request utilized the service request titled “Other”. This addendum provides similar information regarding the steps to submit some additional SRDs.

2.1 Create a *CalCloud Services* Service Request

All users are able to submit a *CalCloud Services* service request using any of the following methods:

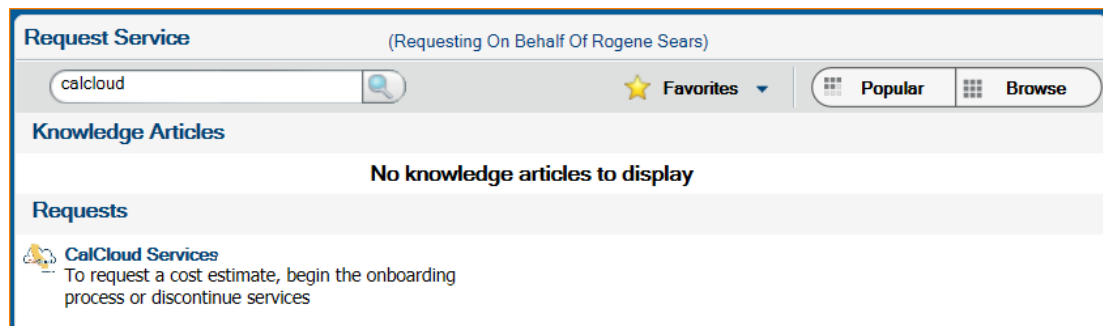
1. Click *CalCloud Services* from the list of popular requests on the console. (Figure 2.1.1). If there is more than one page, click the *Next Page* or *Previous Page* arrows, or select a page from the drop-down list.

NOTE: Since the system will adjust the contents of the Popular Requests screen based on usage during a specific period of time, the *CalCloud Services* option may not be available when you navigate to this screen.



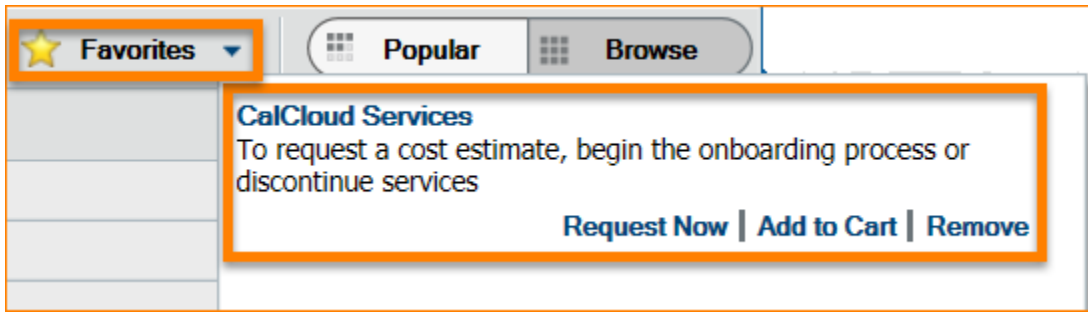
[Figure 2.1.1: CalCloud Services request in the Popular Requests panel]

2. Enter “CalCloud” in the *Search* field and click the *Search* icon (Figure 2.1.2). Or select the “CalCloud Services” entry from the type-ahead window. The search results show only requests that you are permitted to submit.



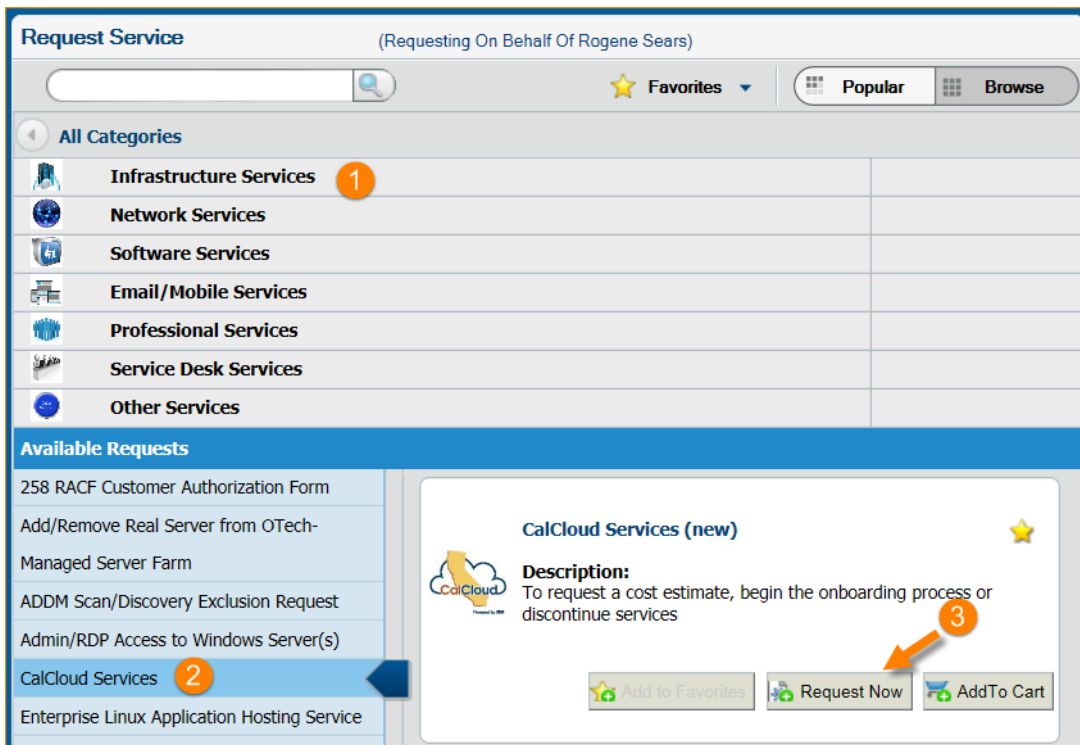
[Figure 2.1.2: Finding CalCloud Services service request using Search button]

3. If “CalCloud Services” service requests have been saved under *Favorites*, click the down arrow next to the *Favorites* link and select *CalCloud Services*. Click *Request Now* from the favorites panel to submit the service request. (Figure 2.1.3)



[Figure 2.1.3: Creating CalCloud Services service request from Favorites link]

4. Browse through the request *Categories* and *Sub-Categories* to find a *CalCloud Services* service request under the *Infrastructure Services* category. Click *Request Now* (Figure 5.1.4) and the form for *CalCloud Services* appears. User contact details, such as phone number and email address, are pre-filled. *Required* fields are in bold to identify information that must be entered to successfully submit the request.



[Figure 2.1.4: Creating CalCloud Services service request]

5. Enter the following information to the *service request* form.
 - a. The date when you need the request to be fulfilled.

- b. Answers to questions that have been provided. Depending on your response to a question, the system might display additional questions.
- c. (Optional) *Attachments*, such as a Microsoft Word document containing information relevant to CalCloud onboarding. Click the *Add* icon underneath the *Required Completion* field to browse to the location of the file on your computer. A maximum of three files can be attached to a request.

The following table (2.1) shows the fields of the *CalCloud Services* service request form.

1. Required Completion

2. Billing Prefix

3. Account Code

4. Approver

Choices: *List of approvers of your department*

5. Second Approver

Choices: *List of approvers of your department*

6. Third Approver

Choices: *List of approvers of your department*

7. Are you requesting a Cost Estimate:

Choices: *Yes, No - Does not require a cost estimate, No - I have received a cost estimate*

Selecting "No – I have received a cost estimate" dynamically adds the following field

7.1 Cost Estimate Amount

8. What is the nature of your request

Options: *New Service, Modified Service, Discontinue Service, Other*

9. What is your approved budget amount?

10. I understand that OTech will charge my department the applicable rates and/or pass-through charges for the services being requested

11. Have you completed and attached the CalCloud Tenant Onboarding Questionnaire?

Choices: *Yes, Not Applicable*

12. Have you completed and attached the CalCloud Portal User Setup Questionnaire?

Choices: *Yes, Not Applicable*

13. Summarize your request

14. Request Details

[Table 2.1: Fields of CalCloud Services (new) service request form]

The following screenshot (Figure 2.1.5) shows the *CalCloud Services* request form.

CalCloud Services

Requested By: Shannon Warren | Phone: | Edit

Requested For: Rogene Sears | Email: |

Required Completion: |

Attachments: + + +

Instructions

Billing Prefix * MN

Account Code 001

Approver * Jamie Mangrum

Second Approver * Phil DeLeon

Third Approver * None

Are you requesting a cost estimate?* ☐ Yes ☐ No - Does not require a cost estimate
☒ No - I have received a cost estimate

Cost Estimate Amount \$15,000

What is the nature of your request?* New Service

What is your approved budget amount? \$15,000
Depending on what you are requesting, a budget amount may be required. (Examples: New server or software license). Leaving this blank may result in delays or rejection of this request.

I understand that OTech will charge my department the applicable rates and/or pass-through charges for the services being requested. * ☒ Yes ☐ No
Please check our [rates](#).

Have you completed and attached the CalCloud Tenant On-boarding Questionnaire? * ☒ Yes ☐ Not applicable
The [CalCloud Tenant On-boarding Questionnaire](#) is required for this request.

Have you completed and attached the CalCloud Portal User Setup Questionnaire?* ☒ Yes ☐ Not applicable
The [CalCloud Portal User Setup Questionnaire](#) is required for this request.

Summarize your request* Two Large Virtual Servers

Request Details Request details are added to this location.

Summary Add To Cart Save As Draft Submit

[Figure 2.1.5: Fields of CalCloud Services service request form]

6. Click *Save as Draft* if additional information is being gathered to submit the request. The request will appear in the list of requests in draft mode and can be submitted at a later date.

7. To view a summary of the information entered, click *Summary* (Figure 2.1.5) in the lower left corner of the service request form. To print a summary, click the *Print* link at the top right of the *Summary* page (Figure 2.1.6).

CalCloud Services

Summary [Print](#)

Request Name: CalCloud Services
Expected Completion: 2/5/2016 11:44:22 AM
Requested By: Shannon Warren
Requested For: Rogene Sears
Phone:
Email:

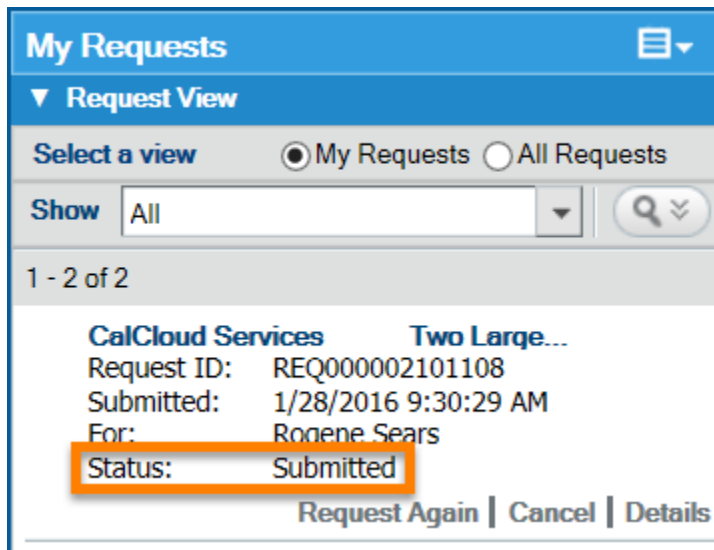
Provided Information

Billing Prefix * :	MN
Account Code :	001
Approver * :	Jamie Mangrum
Second Approver * :	Phil DeLeon
Third Approver * :	None
Are you requesting a cost estimate?* :	No - I have received a cost estimate
Cost Estimate Amount :	\$15,000
What is the nature of your request? * :	New Service
What is your approved budget amount? :	\$15,000
I understand that OTech will charge my department the applicable rates and/or pass-through charges for the services being requested. * :	Yes
Have you completed and attached the CalCloud Tenant Onboarding Questionnaire? * :	Yes
Have you completed and attached the CalCloud Portal User Setup Questionnaire?* :	Yes
Summarize your request* :	Two Large Virtual Servers
Request Details:	Request details are added to this location.

[Back](#) [Add To Cart](#) [Save As Draft](#) [Submit](#)

[Figure 2.1.6: Summary page of a CalCloud Services service request form]

8. Click the *Back* button from the *Summary* page to return back to *CalCloud Services* form.
9. Click *Submit* to submit the service request.
10. Check the *My Requests* pane to ensure that the *CalCloud Services* service request was submitted and that the *Status* of the service request is *Waiting Approval*. (Figure 2.1.7)



[Figure 2.1.7: My Requests pane showing the “Submitted” status of CalCloud Services service request]

2.2 Create a *Professional Services* Service Request

All users may submit a *Professional Services* request. This service request is meant for requesting consulting services from CDT.

Professional Service requests can be created using any of the following approaches.

1. Service requests can be created in one of three methods: Select *Professional Services* from the popular requests section of the console. Click *More* to view additional requests. If there is more than one page of previous requests, click the *Next Page* or *Previous Page* arrows or select a page from the drop-down list to view additional requests.

NOTE: Since the system will adjust the contents of the Popular Requests screen based on usage during a specific period of time, the *Professional Services* option may not be available when you navigate to this screen.

The screenshot below shows the *Professional Services* request in the *Popular Requests* panel (Figure 2.2.1).



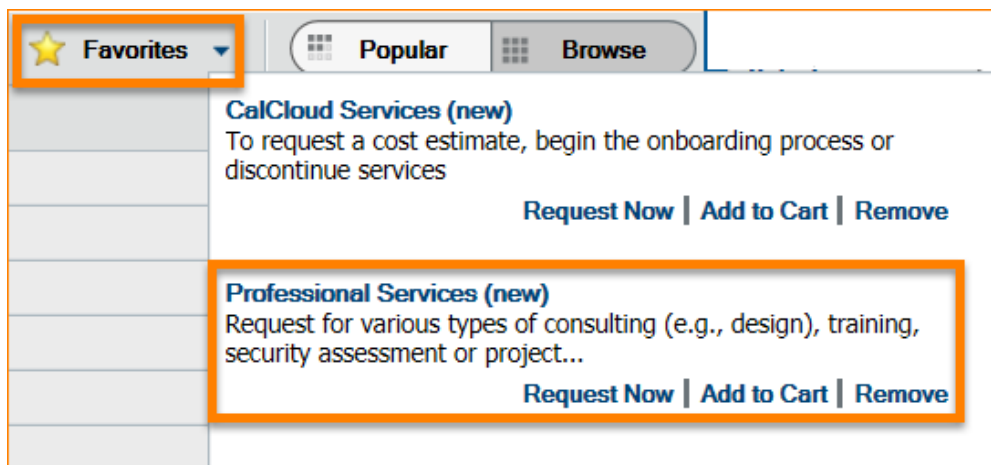
[Figure 2.2.1: Professional Services request in the Popular Requests panel]

2. Enter “*Professional*” in the *Search* field and click the *Search* icon or select the “*Professional Services*” entry from the type-ahead window. The following screenshot shows the result of the search (Figure 2.2.2).



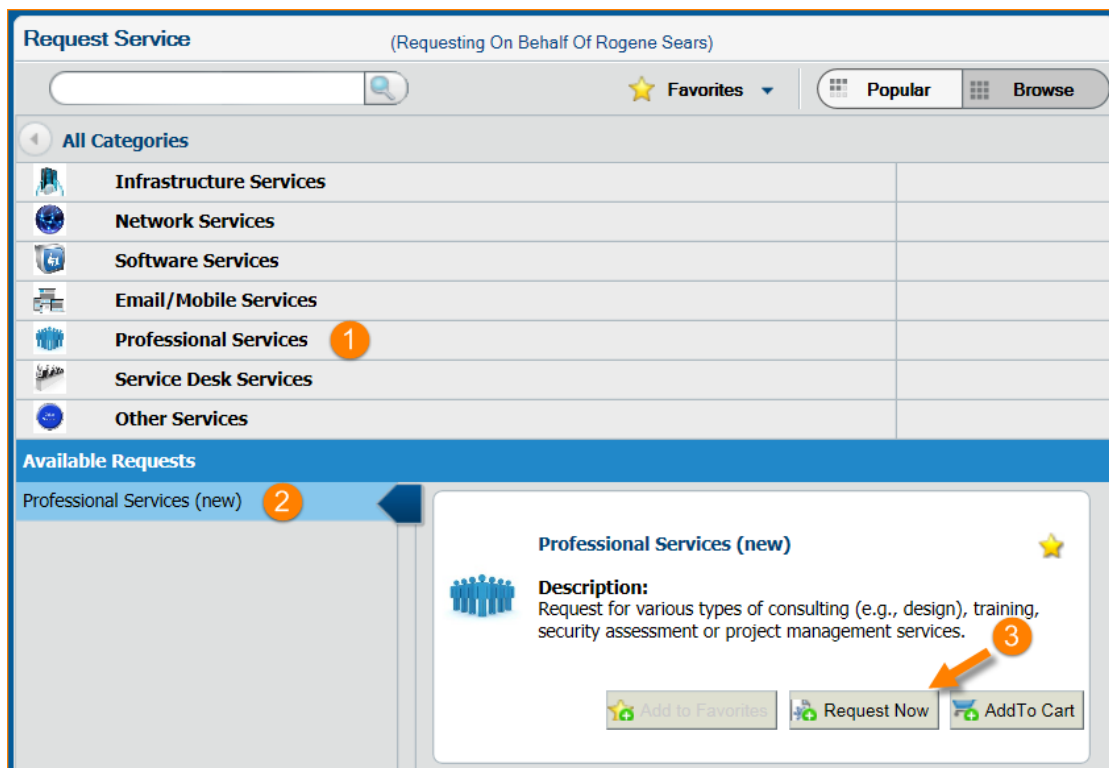
[Figure 2.2.2: Finding Professional Services request using Search field]

3. If “*Professional Services*” have been saved under *Favorite* service requests, click the down arrow next to the *Favorites* link to locate *Professional Services* (Figure 2.2.3). Click *Request Now* from the favorites panel to initiate the service request.



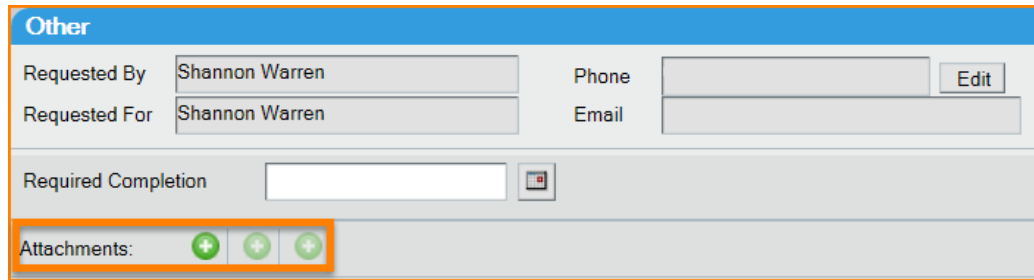
[Figure 2.2.3: Creating Professional Servicesrequest from Favorites link]

4. Another method to locate service requests is by browsing through the request *Categories* and *Sub-Categories*. “*Professional Services*” service request is available under *All Categories*. Click *Request Now* and (Figure 2.2.4) the form for the *Professional Services* appears. User specific details, including phone number and email address are pre-filled. *Required* fields in bold will help the user identify information required to be provided to successfully submit the request.



[Figure 2.2.4: Creating Professional Services service request]

5. Enter the following information in the *service request* form.
 - a. The date when you need the request to be fulfilled.
 - b. Answers to questions/request for data that are part of the service fulfillment process. Depending on a response to a question/request for data, the system might display additional questions.
 - c. (Optional) *Attachments*, such as a Microsoft Word document containing additional information about the professional services you are requesting. Click the *Add* icon underneath the Required completion field (Figure 2.2.5) to browse to the location of the file on your computer. A maximum of three files can be attached to a request.



The screenshot shows a form titled "Other" with a blue header. Below the header, there are several input fields: "Requested By" with the value "Shannon Warren", "Requested For" with the value "Shannon Warren", "Phone" (empty), and "Email" (empty). There is an "Edit" button next to the "Phone" field. Below these fields is a "Required Completion" field with a calendar icon. At the bottom, the "Attachments" section is highlighted with an orange border and contains three green plus icons for adding files.

[Figure 2.2.5: Attaching a file to service request]

The following table (2.2) shows the fields on the *Professional Services* form

1. Required Completion

2. Billing Prefix

3. Account Code

4. Approver

Choices: *List of approvers of your department*

5. Second Approver

Choices: *List of approvers of your department*

6. Third Approver

Choices: *List of approvers of your department*

7. Do you wish to expedite the request?

If answer to the above question is Yes, the following field appears

7.1 Expedite Fee: \$515

8. Are you requesting a Cost Estimate:

Choices: *Yes, No - Does not require a cost estimate, No - I have received a cost estimate*

Selecting "No - I have received a cost estimate" dynamically adds the following field

8.1 Cost Estimate Amount

9. What is your approved budget amount?

10. I understand that OTech will charge my department the applicable rates and/or pass-through charges for the services being requested

11. What kind of consulting are you requesting?

Choices: California PMO, *Geospatial Information Systems (GIS)*, *IT Architectural Services*, *ITPOD*, *Networking*, *OTech Projects*, *Performance*, *Security*, *Statewide Technology Procurement Division (STPD)*, *Troubleshooting*, *Web Development and Design*.

12. Summarize your request

13. Request details

14. How many hours are you going to need?

15. Contract start date

16. Expected contract end date

[Table 2.2: Fields of the Professional Services form]

The screenshot shows a web form titled "Professional Services (new)". At the top, there are fields for "Requested By" (Shannon Warren) and "Requested For" (Rogene Sears), along with "Phone" and "Email" fields, and an "Edit" button. Below this is a "Required Completion" date field. An "Attachments" section shows three green plus icons. A collapsed "Instructions" section is visible. The main form fields include: "Billing Prefix" (AH), "Account Code" (002), "Approver" (Phil DeLeon), "Second Approver" (Jamie Mangrum), and "Third Approver" (None). There are radio buttons for "Do you wish to expedite this request?" (No, Yes), with "Yes" selected. The "Expedite Fee" is \$515. A question "Are you requesting a cost estimate?" has radio buttons for "Yes" and "No - Does not require a cost estimate". A checkbox "I understand that OTech will charge my department the applicable rates and/or pass-through charges for the services being requested." is checked, with a link to "rates". "What kind of consulting are you requesting?" is Troubleshooting. "Summarize your request" is Troubleshooting. "Request details" is a text area containing "Troubleshooting details will go here.". "How many hours are you going to need?" is 20. There are also fields for "Contract start date" and "Expected contract end date". At the bottom, there is a "Summary" tab highlighted with an orange box, and buttons for "Add To Cart", "Save As Draft", and "Submit".

[Figure 2.2.6: Example of a Professional Services request form]

6. Click *Save as Draft* if additional information is being gathered to submit the request. The request will appear in the list of requests in draft mode and can be submitted at a later date.

7. To view a summary of the information entered, click *Summary* (Figure 2.2.7) in the lower left corner of the service request form. To print a summary, click the *Print* link at the top right of the *Summary* page.

Professional Services (new) ×

Summary [Print](#)

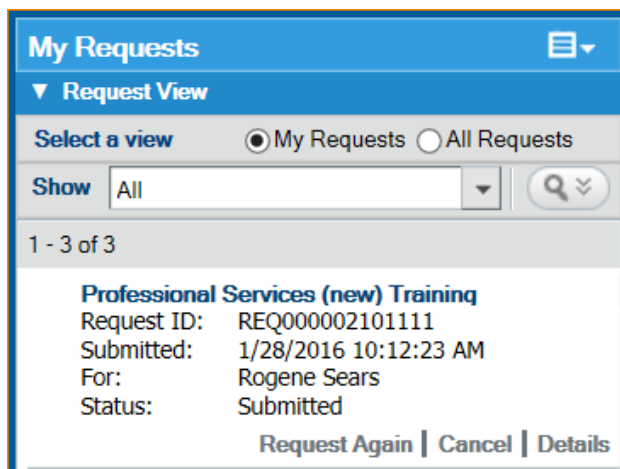
Request Name: Professional Services (new)
Expected Completion: 2/5/2016 11:53:44 AM
Requested By: Shannon Warren
Requested For: Rogene Sears
Phone:
Email:

Provided Information

Billing Prefix * :	AH
Account Code :	002
Approver * :	Phil DeLeon
Second Approver * :	Jamie Mangrum
Third Approver * :	None
Do you wish to expedite this request? :	Yes
Expedite Fee :	\$515
Are you requesting a cost estimate?* :	No - I have received a cost estimate
Cost Estimate Amount :	\$5,000
What is your approved budget amount? :	\$5,000
I understand that OTech will charge my department the applicable rates and/or pass-through charges for the services being requested. * :	Yes
What kind of consulting are you requesting? * :	Troubleshooting
Summarize your request* :	Troubleshooting
Request details* :	Troubleshooting details will go here.
How many hours are you going to need? * :	20
Contract start date :	
Expected contract end date :	

[Figure 2.2.7: Summary page of a Professional Services request form]

8. Click *Back* to return to *Professional Services* form.
9. Click *Submit* to submit the service request.
10. Check the *My Requests* pane to ensure that the service request was submitted and that the *Status* of the service request indicates *Submitted* (Figure 2.2.8).



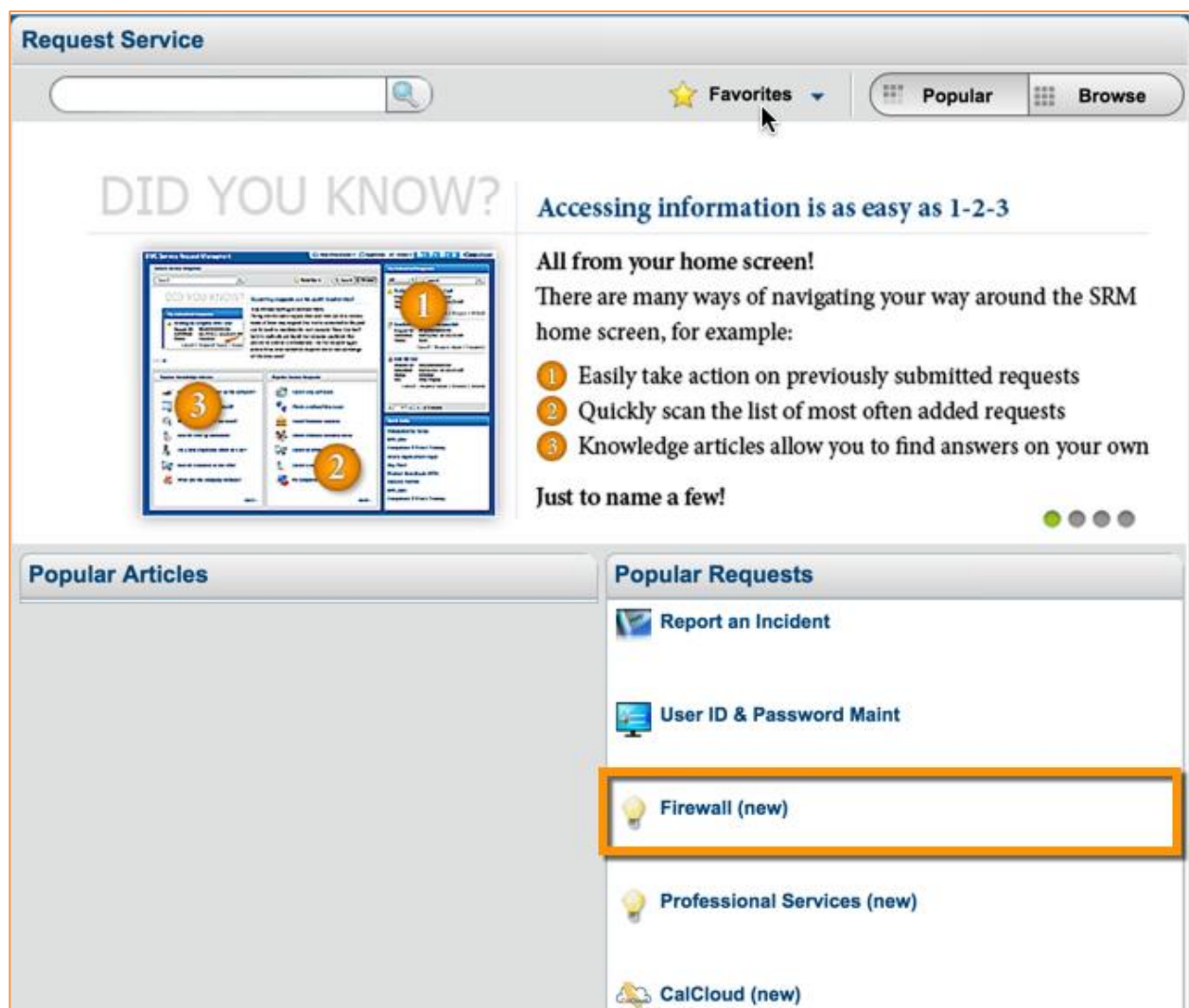
[Figure 2.2.9: My Requests pane showing the submission of Professional Services SR]

2.3 Create *Firewall* Service Request

CDT customers are able to submit *Firewall* service requests using any of the following methods:

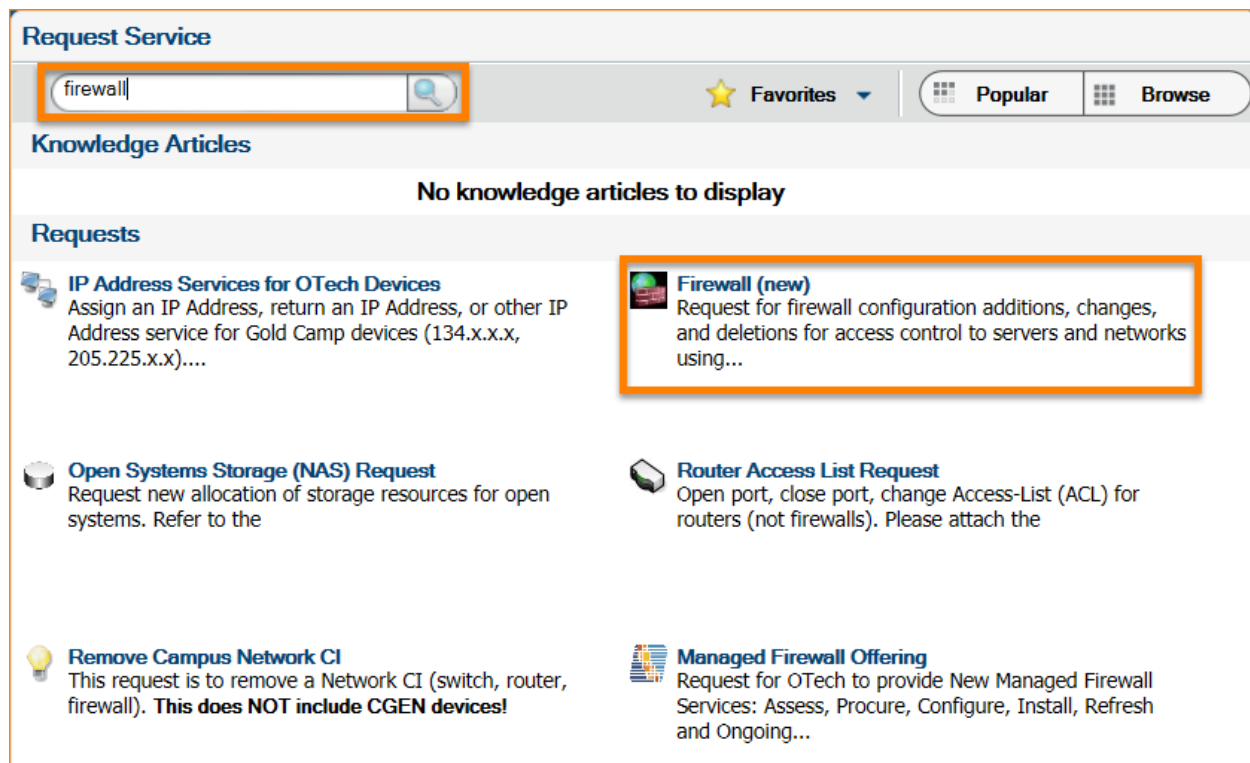
1. Firewall service request can be submitted using one of four methods:
 - a. One way to submit is to click *Firewall* from the list of popular requests on the console (Figure 2.3.1). If there is more than one page, click the *Next Page* or *Previous Page* arrows, or select a group from the drop-down list.

NOTE: Since the system will adjust the contents of the Popular Requests screen based on usage during a specific period of time, the *Firewall* option may not be available when you navigate to this screen.



[Figure 2.3.1: Firewall services request in the Popular Requests panel]

- b. Another way to submit a Firewall service request is to enter “Firewall” in the *Search* field and click the *Search* icon or select the “Firewall” entry from the type-ahead window. The following screenshot shows the result of the search (Figure 2.3.2).



[Figure 2.3.2: Searching Firewall service request using Search feature]

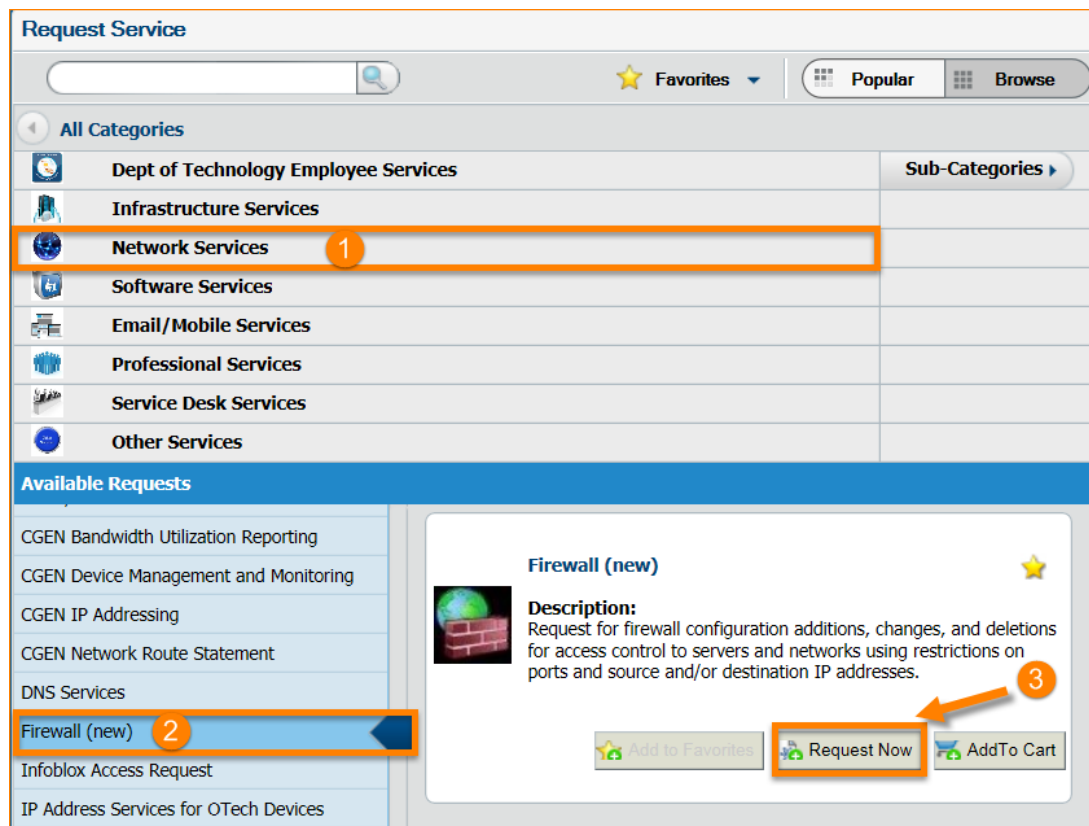
- c. Another way to submit a Firewall service request is from the Favorites drop down window. If "Firewall" has been saved as a *Favorite* service request, click the down arrow next to the *Favorites* link to locate *Firewall*. Click *Request Now* from the favorites panel to initiate the service request.



[Figure 2.3.3: Creating Firewall request from Favorites link]

- d. Another way to submit a Firewall service request is to browse through the request *Categories* and *Sub-Categories* to find a *Firewall* service request under *Network Services* category. Click *Request Now* (Figure 2.3.4) and the

form for *Firewall* appears. User contact details, such as phone number and email address, are pre-filled. *Required* fields have an asterisk next to the field.



[Figure 2.3.4: Creating Firewall service request]

The following table shows the fields of the *Firewall* service request form.

1. Required Completion

2. Billing Prefix*

3. Expedite Options

Choices: *Show*

If *Show* is checked the following fields are added to the form dynamically

3.1 Expedite Fee

3.2 Do you wish to expedite this request at this fee?

Choices: *No, Yes*

4. Approver*

Choices: *List of approvers of your department*

5. Secondary Approver*

6. Third Approver*

7. Account Code

8. Summary

9. Request Details

10. Firewall Table

10.1 Action

Choices: *Add, Remove*

10.2 Address Translation

Choices: *NAT, None, PAT*

10.3 SOURCE

10.3.1 Source Function

Choices: *Appliance, Application, DB, Infrastructure, Mainframe, Printer, User Internal, User Public, Web, Web/App, Workstation*

10.3.2 Source IP Type

Choices: *IPv4, IPv6*

If *IPv6* is selected, the *Source IP Address* field changes from 4 input fields to single input field. Also, the *Source Subnet Mask Address* field changes from a combo box to an input text field.

10.3.3 Source IP Address

Four fields if *IPv4* is selected as *Source IP Type*. If *IPv6* is selected as *Source IP Type*, it is a single input field. An example entry for *IPv4 Source IP Type* is

10.10.10.50

10.3.4 Source Host Name

10.3.5 Source Net Mask

Choices: *Host, Network*.

If *Network* is selected, the following field is dynamically added to the field.

10.3.6 Source Subnet Mask Address

Choices: */16 (255.255.0.0), /17 (255.255.128.0), /18 (255.255.192.0), /19 (255.255.224.0), /20 (255.255.240.0), /21 (255.255.248.0), /22 (255.255.252.0), /23 (255.255.254.0), /24 (255.255.255.0), /26 (255.255.255.192), /26 (255.255.255.192), /27 (255.255.255.224), /28 (255.255.255.240), /29 (255.255.255.248), /30 (255.255.255.252)*

10.4 DESTINATION

10.4.1 Destination Function

Choices: *Appliance, Application, DB, Infrastructure, Mainframe, Printer, User Internal, User Public, Web, Web/App, Workstation*

10.4.2 Destination IP Type

Choices: *IPv4, IPv6*

If *IPv6* is selected, the *Destination IP Address* field changes from 4 input fields to single input field.

10.4.3 Destination IP Address

Four fields if *IPv4* is selected as *Destination IP Type*. If *IPv6* is selected as *Destination IP Type*, it is a single input field. An example entry for *IPv4 Destination IP Type* is *10.10.10.50*.

10.4.4 Destination Host Name

10.5 Do you need a range of ports?

Choices: *No, Yes*

If *Yes* is selected, the following fields dynamically added to the table

10.5.1 Port-Begin

10.5.2 Port-End

10.5.3 Max

If *Max* is checked, Port-End defaults to 65535.

10.6 Protocol

Choices: *AH, ESP, GRE, ICMP, IP, TCP, UDP*

10.7 Port

10.8 Destination Net Mask

Choices: *Host or Network*. If *Network* is selected, the following field is dynamically added.

5.15.1 Destination Subnet Mask Address

Choices: */16 (255.255.0.0), /17 (255.255.128.0), /18 (255.255.192.0), /19 (255.255.224.0), /20 (255.255.240.0), /21 (255.255.248.0), /22 (255.255.252.0), /23 (255.255.254.0), /24 (255.255.255.0), /26 (255.255.255.192), /26 (255.255.255.192), /27 (255.255.255.224), /28 (255.255.255.240), /29 (255.255.255.248), /30 (255.255.255.252)*

10.9 Add

10.10 Clear

11. Results Table

11.1 Preferences

Choices: *Add Column, Remove Column, Set Refresh Interval, Reset, Save*

11.2 Refresh

11.3 Report

11.4 Select All

11.5 Deselect All

11.6 Delete Selected

11.7 Copy Selected

11.8 Copy to Source IP

11.9 Copy to Destination IP

[Table 2.3: Fields of the Firewall form]

*Required Fields.

Completing the *Firewall* request form is a multi-step process.

1. The first step is to enter the first *Firewall* request entry into the table shown as follows.

Custom and Mapped Data

Required Completion

Attachments: + + +

Instructions:

Billing Prefix*

B5

Expedite Options

Show

Approver*

Second Approver*

Third Approver*

Action

Add

Do you need a range of ports?

No

Address Translation

NAT

Source Function

Web

Source IP Type

IPv4

Source IP Address

10

10

10

50

Source Host Name

SourceHost

Source Net Mask

Network

Source Subnet Mask Address

/24 (255.255.255.0)

Destination Function

Web

Destination IP Type

IPv4

Destination IP Address

10

10

10

50

Destination Host Name

DestHost1

Protocol

TCP

Port

80

Destination Net Mask

Network

Destination Subnet Mask Address

/24 (255.255.255.0)

Add

Clear

0 of 0 results

Preferences

Refresh

Action	Function...	Host Na...	IP - Source	Function...	Host Na...	IP - Detin...	Port	Protocol	Policy

Delete Selected

Copy Selected

Copy to Source IP

Copy to Destination IP

[Figure 2.3.5: Firewall request entry table in the Firewall form]

- Once you click *Add*, the firewall entry is shown in the bottom table. If the firewall entry is allowed by OTech policy, it will be displayed as green and the *Policy* field will display *Allowed* as shown in Figure 2.3.7. If the policy is conditional, the firewall entry is shown in orange color (Figure 2.3.7). If the OTech policy identifies the firewall request as *Exception*, the user is required to provide justification (Figure 2.3.6).

[Figure 2.3.6: Form for submitting the reason for exception request]

Action	Function...	Host Nam...	IP - Source	Function ...	Host Nam...	IP - Destina...	Port	Protocol	Policy
Add	Application	Host1	134.192.10.1	Application	Host1	134.192.10.1	80 - 65535	TCP	Allowed
Add	Application	Host1	134.192.10.1	DB	Host1	134.192.10.1	80 - 65535	TCP	Allowed
Add	User Public	Host1	134.192.10.1	DB	Host1	134.192.10.1	80 - 65535	TCP	Exception
Add	Appliance	Host1	134.192.10.1	DB	Host1	134.192.10.1	80 - 65535	TCP	Conditional
Add	Appliance	Host1	134.192.10.1	Appliance	Host1	134.192.10.1	80 - 65535	TCP	Conditional
Add		Host1	134.192.10.1		Host1	134.192.10.1	80 - 65535	TCP	

[Figure 2.3.7: Firewall entry result table showing Allowed, Exception, Conditional policy]

- To create multiple firewall entries, click on Copy Source IP or Copy Destination IP and completed the following form.

Policy

Policy Details

Conditions	
Allowed	The source/destination functions selected by the user do not appear to violate any known OTech security policies. It does not mean the request will be approved as additional items will be taken into consideration (such as port) but approval is likely.
Conditional	More information is needed by Security in order to make an approval decision. The system will prompt the submitter to enter additional information about their request.
Exception	The source/destination functions selected by the submitter violate OTech security policies. In order for Security to approve the firewall request, the submitter must already have an approved Security Exception request for the environment on file. The submitter is prompted to enter the Service Request number for that approved Security Exception Request.
Invalid	The source/destination functions selected by the submitter appear to be invalid. The SRD treats this as an “exception” condition and the submitter is told their request is likely invalid and may result in rejection of the request. They are prompted to provide additional information.
<Blank>	If the policy doesn’t show anything, it means that firewall policy condition does not match with any of the above four conditions.

[Table 2.3: Firewall Policy table]

The screenshot shows a web-based form titled "DTS:FirewallCopyDialog". The browser address bar displays the URL "https://service-technology-qa.us.onbmc.com/arsys/forms/onbmc-s/DTS%3AFirewallCo...". The form contains several input fields: "Host Name" with the value "DestHost2", "IP Type" with a dropdown menu showing "IPv4", "IP Address" with four input boxes containing "10", "10", "10", and "51", "Net Mask" with a dropdown menu showing "Network", and "Subnet Mask Address-IPv4" with a dropdown menu showing "/24 (255.255.255.0)". An "Apply" button is located at the bottom left of the form.

[Figure 2.3.8: Form to create additional firewall entries by copying entries from source or destination]

- Click *Save as Draft* if additional information is being gathered to submit the request. The request will appear in the list of requests in draft mode and can be submitted at a later date.

5. To view a summary of the information entered, click *Summary*. To print a summary, click the *Print* link at the top right of the *Summary* page.
6. Click *Submit* to submit the *Firewall* service request.
7. Check the *My Requests* pane to ensure that your service request is submitted and that the *Status* of the service request is *Waiting Approval*. Refer to the screenshot below.



[Figure 2.3.9: My Requests pane showing the submission Firewall service request]